



**TERMS OF REFERENCE
FOR THE
APPOINTMENT OF A SERVICE PROVIDER
TO
SUPPLY AND IMPLEMENT MICROSOFT 365
BUSINESS FOR 45 USERS ON SUBSCRIPTION
FOR 36 MONTHS**

1. Background to the CBE

The Council for the Built Environment (CBE) is a statutory body established under the Council for the Built Environment Act (no. 43 of 2000). It is an overarching body that coordinates the six Professional Councils (Architecture, Engineering, Landscape Architecture, Project and Construction Management, Property Valuation and Quantity Surveying – all operating within the Built Environment) for the purpose of promoting good conduct within the Profession, transforming the professions and advising Government on issues relating to the Built Environment. The CBE is a schedule 3(a) public entity and is subject to compliance with the Public Finance Management Act (PFMA) Act No. 29 of 1999 and Treasury regulations.

2. Background to the Assignment

CBE is in the process to migrate our organization's IT environment onto cloud and the Microsoft 365 Business is one of the solutions identified to meet some of the organisational cloud objectives and in so doing our services will run with the latest cloud technology and world-class protection by Microsoft. We would like to enhance the efficiency of our IT and our Business Operations by deploying a solution that is capable to manage devices, protect against real-world threats, and provide the latest in business software.

The CBE needs to be protected against threats, secure its business data, secure its devices and have the ability to perform online archiving of emails. The CBE needs to give its employees the tools they need to effectively and flexibly work, whereby users will be able to work from anywhere and anytime.

We need the tools to update, manage, and protect our computers and devices, including the devices our employees bring to work. We want to have the ability to install Office apps on our employees' devices, safeguard their data, and lock them down if it is lost or stolen.

The solution should also address the backup of data on the cloud and the patch management on the software's without any hassle. The Disaster Recovery should be included in the services as well.

3. Objective of the Assignment

The objective of the assignment is to appoint a Microsoft Partner Service Provider to supply and implement Microsoft 365 Business. ***As CBE we need our data to be protected on personal devices with PIN access, and restricted copy and saving. We want to make sure that only authorized people can access sensitive information.***

CBE wants to protect work files on devices by restricting mobile access, such as copy and paste. We also want to be able to selectively wipe business data from enrolled mobile devices if they are lost or stolen.

The CBE needs the best-in-class productivity solution. We need our employees to share and edit documents, access email and calendars with Outlook, even when they are off-site. Simplifying of policy implementation through the Microsoft Configuration that are already included in the package.

4. Productivity Suite Requirements

Below is the List of Productivity Suite the CBE wants:

Productivity Suite	Service Provider's response to address required Productivity Suite
Web versions of Office applications	
Mobile versions of Office applications	
Email & calendaring	
File storage & sharing	
Teamwork & communication	
Security & compliance	
Support & deployment	
Desktop versions of Office applications for PC & Mac	
Tools to manage your business e.g. Workflow	
Advanced Security	
Device management	
Backup	
Disaster Recovery	



5. Scope of work and project deliverables

The scope of work and project deliverables are as follows:

Item No.	Scope of work	Deliverables
1	<p>Supply and Implement Microsoft 365 Business For 45 Users on a subscription for 36 Months</p> <ol style="list-style-type: none"> Supply of Licenses Implement the solution Productivity Suite Response (Please elaborate how you will address the requirements) Subscription License Maintenance and Support Data Migration from current Microsoft Solution (Office 2013 & Windows 10 Enterprise) and File Server Data Skills Transfer to Administrators 	<ul style="list-style-type: none"> Proposal Document with Pricing (pricing to be placed in a separate envelope) Subscriptions Licenses Keys Configuration Product Features Checklist Response in table format to address item 4. License Confirmation from Software OEM Implementation Plan Data Migration Plan SLA Support and Maintenance – Draft Project Plan

6. Project timeframes

The estimated timeline for completing the scope of work is 4 weeks from the date of signing the contract.



7. Evaluation Process:

The following evaluation process shall be followed:

7.1 Basic Compliance:

- a) Potential service providers must ensure that they are registered on the National Treasury Central Supplier Database (CSD). The CSD registration report must be submitted. Prospective bidders must be tax compliant. **This bid will not be awarded to any bidder who is not registered on the CSD, whose tax matters are not in order and is a restricted supplier.**
- b) **Pre-qualification:** only **B-BBEE Level 1** and **Level 2** contributors must submit a response to this bid. An original or certified copy of a correct and valid B-BBEE certificate (**only SANAS accredited certificates will be accepted**) OR sworn affidavit (whichever is applicable) must be submitted to confirm your Level 1 or 2 status. Failure to submit a B-BBEE certificate or sworn affidavit will result in the disqualification of your bid. Failure to submit a correct and valid certificate or sworn affidavit will result in the disqualification of your bid. Any enquiries in respect of B-BBEE Status Level Verification Certificates may be directed to the Department of Trade and Industry (DTI) at 0861 843 384.
- c) A compulsory briefing session will be held on **12 June 2019** at the CBE office, 169 Corobay Avenue, Menlyn, Pretoria, Block A, second floor at 10:00AM.
- d) All Supply Chain Management compliant (required) documents must be completed in full and submitted. These include: SBD 1, 4, 6.1, 8 & 9. Failure to fully complete these documents and failure to return one or more with your proposal will result in the disqualification of your proposal. **The onus is on bidders to make sure that all SBD forms are completed in full and returned with your bid.**
- e) The General Conditions of Contract are to be acknowledged and returned with your bid.
- f) **The CBE reserves the right to disregard a bidders' bid should it be found that work was previously undertaken for the entity to which poor performance was noted during the execution of such contract.**



7.2 Evaluation Phases:

- Phase 1: Technical Specification Evaluation

The service provider's bid will be evaluated against the set criteria indicated under paragraph 7.3 below. A form will be used which will reflect the name of the service provider, the different criteria, with space provided to record the points awarded and motivation for points awarded. The allocation of points will not be effected on a basis of consensus.

The following scoring matrix will be used:

Very poor	Poor	Fair	Good	Very good	Excellent
0	1	2	3	4	5

The following formula will be used to convert the points scored against the weight:

$$P_s = \left(\frac{S_o}{M_s} \right) \times 100$$

Where:

Ps = Percentage scored for functionality by bid under consideration
 So = Total score of bid under consideration
 Ms = Maximum possible score

Service providers will be expected to achieve a minimum threshold score of 70% in order to proceed further in the evaluation process.

A due diligence process will be conducted in respect of all short-listed bidders to determine the capability and ability of short-listed bidders to execute this contract. This may include a presentation by bidders with pre-determined questions being posed by the CBE or an investigation by the CBE of the bidder's previous contracts carried out, availability of skills or knowledge, existing work load, etc. Should the bidder fail to meet the requirements of due diligence, their bid will be disregarded at this point and they will not proceed to Phase 2.

- Phase 2: Calculation of points

Please note that the proposals will be evaluated using the 80/20 preference point system where:



80 points are allocated for price and 20 points are allocated for the service provider's B-BBEE Level of Contribution. The original or certified copy of the B-BBEE certificate or sworn affidavit (whichever is applicable) will also be used (in addition to being a pre-qualification criteria) to substantiate claims for preference points with respect to SBD 6.1.

During phase 2, points for price will be calculated for all shortlisted service providers in accordance with the following formula:

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where:

P_s = Points scored for price of bid under consideration
 P_t = Rand value of bid under consideration
 P_{\min} = Rand value of lowest acceptable bid

- The final points will be calculated as follows:

Points for price:	80 points
B-BBEE Status Level of Contribution:	<u>20 points</u>
Final points:	<u>100 points</u>

The bidder who scores the highest points will be recommended for award of contract. A recommendation for award will be formulated for approval by the relevant delegated authority.

7.3 Evaluation Criteria

The following criteria and weights shall apply when considering the proposals:

CRITERIA FOR TECHNICAL SPECIFICATION	WEIGHT
Experience relevant to assignment Provide proof of internal organisation capacity (CV's and Qualifications)	50



Provide Proof of Microsoft Projects Implemented (Microsoft 365 Packages). Provide a minimum of three signed reference letters related to the implemented projects within the last 3 years	
OEM Accreditation The service provider should be Accredited with Microsoft 365 Solutions	20
Product Requirements Suite The service provider should meet the productivity suite requirements as per paragraph 4 above.	30
Total	100
Minimum Threshold Score	70

Important Notes

- I. Pricing for the contract duration must be **firm**.
- II. Pricing must be inclusive of VAT (if VAT registered).
- III. Bidders are required to submit their proposals in TWO envelopes in the following format: Envelope 1 (Technical Proposal) and Envelope 2 (Financial Proposal).
- IV. Proposals must be hand delivered to 169 Corobay Avenue, Corobay Corner (Block A – 2nd Floor), Menlyn, Pretoria and deposited into the bid box.
- V. It is the responsibility of prospective bidders to ensure that their bid documents are submitted before the closing date and time of the bid.
- VI. Proposals received after the closing time and date will not be considered for evaluation.
- VII. The CBE reserves the right not to award this contract.
- VIII. Any change of information provided in the bid document that may affect delivery by the successful bidder must be brought to CBE's attention as soon as possible. Failure to comply may result in the contract being terminated.
- IX. It must be noted that payment of the deliverables will be made upon the satisfactory delivery of each deliverable and receipt of an invoice.
- X. The invoice will be paid within 30 days of receipt of the invoice. No deposit, advance and lump sum payments will be made.
- XI. Should the bidder present information intentionally incorrectly/fraudulently, they will be disqualified.



- XII. Although adequate care has been given in the drafting of this document, errors such as those of a typographical nature may occur which the CBE will not be responsible for.
- XIII. The closing date for submission of bids is the **21 June 2019 at 11:00AM**.

Written enquiries:

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